



EXPERT FINANCIAL  
PLANNING  
TO HELP YOU REACH  
YOUR FINANCIAL GOALS

LIFE IS FILLED WITH  
FINANCIAL DECISIONS.  
WE CAN HELP YOU  
MAKE THE RIGHT ONES.

Safran Is A New York Based Financial Advisor  
Who Places Your Interests First By Delivering  
Expert, Unbiased Financial Planning And  
Investment Management Advice.

We guide you through every phase of your  
financial life: from developing your wealth to  
achieve what is important to you, to transitioning



term financial success.

We are an SEC Registered Investment Advisor,  
based in New York City.

SOLID FINANCIAL  
PLANNING  
IS THE CORE  
FOR MAKING SOUND  
DECISIONS.

OUR PHILOSOPHY



solutions. Our financial plans are thorough and actionable. We hold you accountable by keeping you motivated help pave your way to achieve your financial goals.

At Safran Wealth Advisors our focus is in providing wealth management, in depth ongoing financial planning and portfolio management. We work with many types of clients. Our clients include single doctors, married executives, divorced families, newlyweds, retired professors and widows in transition. We are proud to service multiple generations of families. We have core competency in working with women whose lives are in transition.

We are a fiduciary in every capacity of our service—our clients' interests come first.



FINANCIAL PLANNI...

INVESTMENT MAN...

WEALTH MANAGE...



## FINANCIAL PLANNING

- Goal Setting
- Cash flow analysis
- Tax planning
- Insurance analysis
- Transition planning
- Retirement planning
- Estate planning

## INVESTMENTS

- Diversified investments
- Periodic rebalancing
- Passive and active investments
- Ongoing management

## WEALTH MANAGEMENT

- Alignment with your goals and values
- Peace of Mind





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